HealthStat System User Guide

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Preface

About This Guide

This user's guide describes how to use the all of the features in HealthStat, an information system (IS) developed to manage the core activities within the Public Health and Safety Division of DPHHS. This information system is web-based and runs on any platform.

This preface describes the conventions used in this guide and in the online help. For an introduction to HealthStat, see Chapter 1, "Introducing HealthStat."

Contents

This guide contains instructions for the most common features used in HealthStat.

Part I: Getting Started – This section includes accessing HealthStat and walks you through the layout of the system.

Part II: Using HealthStat – This section describes how to use HealthStat. It covers managing core activity work plan-specific information.

Assumptions

This guide assumes you are familiar with the version of Internet Explorer you are using. If you are not familiar with Internet Explorer or terms such as "button," "text box," or "drop-down list," please see the content provided on the Resources webpage of HealthStat.

Using the Online Help

The Help hyperlinks within each section of a core activity work plan provide access to the online help. As such, it contains "how to" instructions for managing core activity work plan-specific information.

To open the Help dialog:

1. In the top right-hand corner of the core activity work section you need help with, click Help. The Help dialog appears in a new web page.
2. Once you have reviewed the Help text, click **Exit** to close the Help dialog.

PART I: GETTING STARTED

CHAPTER 1. INTRODUCING HEALTHSTAT

This chapter introduces HealthStat, a web-based information system. Topics in this chapter include:

- How HealthStat can improve your efficiency and quality in managing your core activity work plans
- An overview of the HealthStat system, including:
    - System Access
    - System Command Icons
    - System Navigation
    - System User Rights

About HealthStat

HealthStat is used to gather and manage information regarding program core activities and their associated work plans. In using HealthStat, users are provided with a more consistent approach to managing core activity work plans on a day-to-day basis and while presenting during progress reviews.

Easier   Manage your core activity work plans just like you did previously with paper-based work plans, and preview them while you are updating them. Check for up-to-date resources in one place. Conveniently access and select strategies and personnel.

Faster   Assign tasks to personnel associated with core activity work plans. Work plans are kept up-to-date in real time through electronic submission. HealthStat detects and notifies users of metric information which needs to be updated.

Cost effective Using HealthStat will save you time by eliminating the need and use of paper-based core activity work plans. HealthStat also supports the organization's ability to meet strategic goals in an efficient manner.

System Access

The HealthStat system can be accessed in three ways:

HealthStat Desktop Icon   By double-clicking on the icon, an Internet Explorer web browser window will open with a dialog window (see below) prompting you to enter your Outlook username and password.

PHSD OURS Webpage   By visiting the Division's OURS webpage, you will see a hyperlink to access the HealthStat system under the HealthStat section. You will then be prompted to enter your Outlook username and password.

HealthStat URL   You may also access the HealthStat system by opening up and Internet Explorer web browser window and typing the following URL into the address bar: http://healthstat.mine.mt.gov. As always, you will be prompted to enter your Outlook username and password.
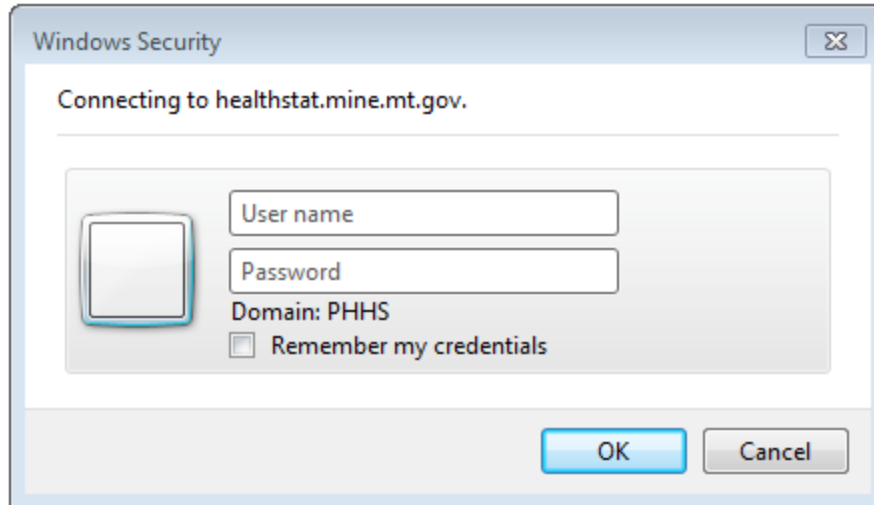
Upon logging into the system, you can confirm that you are signed in by ensuring that your "C" number is in the upper right-hand corner of the web page.

System Command Icons

Each icon provides the user with different ways to interact with the HealthStat system.

Icon		What it means
	Work Plan	You are at the core activity work plan level of the logic model navigation.
	Expand	You can expand the section of the core activity work plan or metric details page to view certain information.
	Expand All	You can expand all of the sections in the core activity work plan or metric details page to view all information.
	Collapse	You can collapse the section of the core activity work plan or metric details page to hide certain information.
	Collapse All	You can collapse all of the sections in the core activity work plan or metric details page to hide all information.
Edit	**Edit**	You have the ability to edit the core activity work plan if you have appropriate rights.
View	**View**	You have the ability to only view the core activity work plan.
« Back To Work Plan	**Back to Work Plan**	You will be taken from the metric details page back to the core activity work plan.
≡ Navigation	**Navigation**	This expands/contracts the viewable area of the core activity work plan and allows the user to hide/show the logic model navigation tree.
Icon		**What it means**

SAVE	**Save**	You can save the edits you have just made to a core activity work plan.
X	**Exit**	You can close a system dialog box.
	Adjust	You can manually adjust how much of the logic model navigation or core activity work plan is in view.
?	**Help**	You can access help regarding questions you may have about managing a certain section of the core activity work plan.

Note: Do not use the browser's navigation to move between core activity work plans and/or metric details pages. Please use the buttons within the window to navigate through the system only.

System Navigation

The system's default page is the Welcome screen, which prompts the user to begin using the system by selecting a work plan from the menu. You will only see this page (see below) once each time you log in to the system.
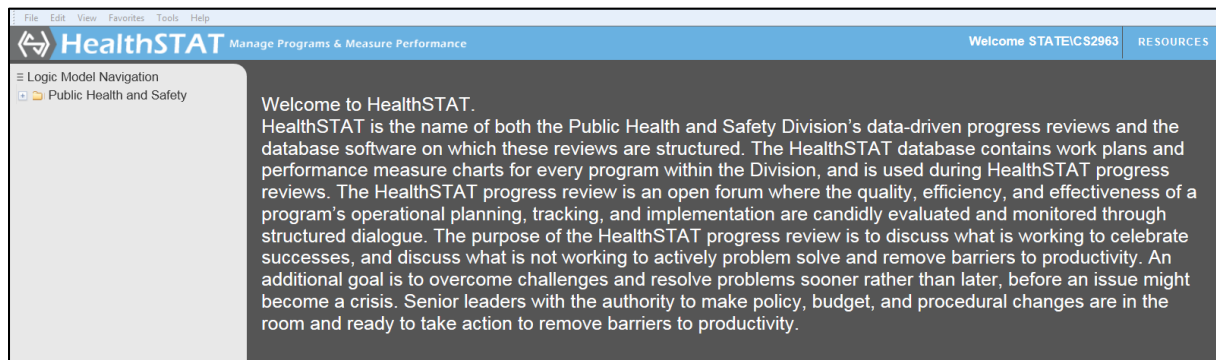

File Edit View Favorites Tools Help

HealthSTAT Manage Programs & Measure Performance   Welcome STATE\CS2963   RESOURCES

≡ Logic Model Navigation
⊞ 🗁 Public Health and Safety

Welcome to HealthSTAT.
HealthSTAT is the name of both the Public Health and Safety Division's data-driven progress reviews and the database software on which these reviews are structured. The HealthSTAT database contains work plans and performance measure charts for every program within the Division, and is used during HealthSTAT progress reviews. The HealthSTAT progress review is an open forum where the quality, efficiency, and effectiveness of a program's operational planning, tracking, and implementation are candidly evaluated and monitored through structured dialogue. The purpose of the HealthSTAT progress review is to discuss what is working to celebrate successes, and discuss what is not working to actively problem solve and remove barriers to productivity. An additional goal is to overcome challenges and resolve problems sooner rather than later, before an issue might become a crisis. Senior leaders with the authority to make policy, budget, and procedural changes are in the room and ready to take action to remove barriers to productivity.

Figure 2: HealthStat Welcome Screen

The system layout is split into three parts (diagram):

HealthStat Header   The header includes the HealthStat System title, allows users to confirm that they are logged into the system, and access resources related to HealthStat progress reviews and the system.

Logic Model Navigation   The navigation tree on the left-hand side of the screen provides easy access to all of the sections of the HealthStat System.

Core Activity Work Plan   The work plan displays information about the selected core activity.

Figure 3: HealthStat System Layout

All core activity work plans are accessed through the logic model navigation. The structure of the navigation reflects the level of scope ranging between the division and core activity levels (See), respectively, and is inspired by the cause-effect relationship of the logic models established within PHSD.
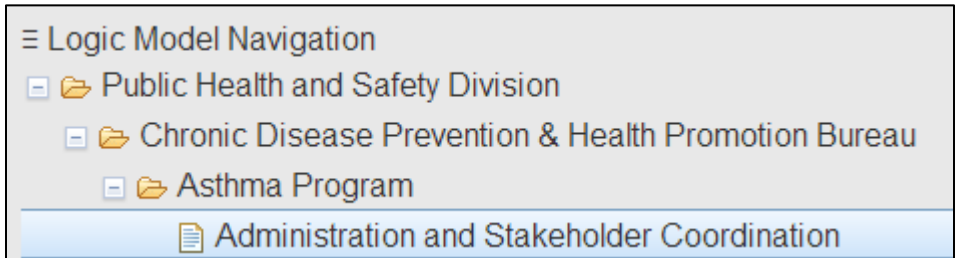

Figure 4: Logic Model Navigation Tree

System User Rights

Anyone who has access to the HealthStat System can view any core activity work plan. However, security rules have been created which allows certain users the ability to manage focused amounts of the core activity work plans they are associated with. Below is a breakdown of the three levels of user rights within the HealthStat system:

- System Administrator

- o Rights: Add new bureaus, programs, core activity work plans, and manage Mission section-related information
- Core Activity Work Plan Manager
  - o Rights: Manage everything except information specific to Mission section
- Core Activity Work Plan Personnel
  - o Rights: Manage information specific to the Outcome Metrics, Process Metrics, Action Plan, and Partner Organization sections

PART II. USING HEALTHSTAT

CHAPTER 2. MANAGING CORE ACTIVITY WORK PLANS

This chapter introduces HealthStat, a web-based information system. Topics in this chapter include:

- Accessing a core activity work plan
    - Expanding a section
    - Collapsing a section
- An overview of core activity work plans
- Section-specific maintenance of core activity work plans

Accessing a Core Activity Work Plan

To access a core activity work plan:
Do the following:
The In the logic model navigation tree, select **Public Health and Safety** | **(Bureau)** | (**Program)** | (**Core Activity)**

The desired Core Activity Work Plan page appears.
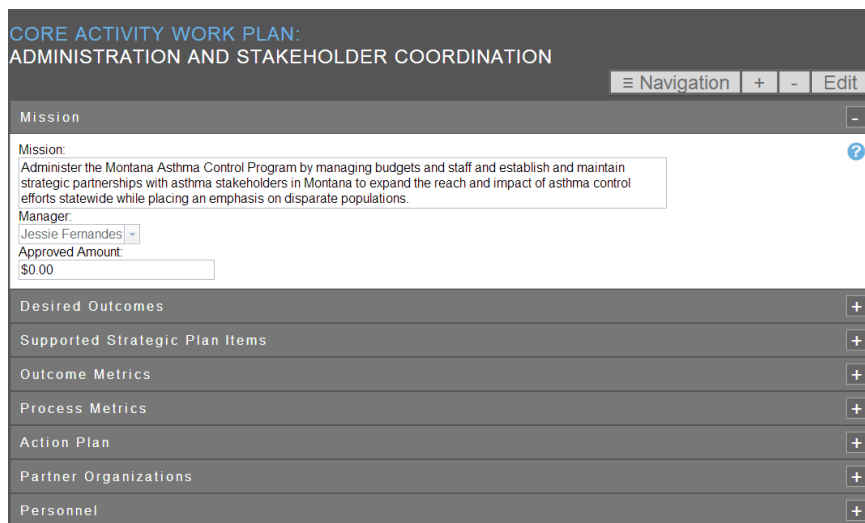
Note: Core activity work plans are defaulted to View mode. To make any edits to a core activity work

plan, you must click **Edit** [Edit] in the upper right-hand corner of the web page before doing so.

To expand one of the sections within the core activity work plan:
Do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"),

select **Expand** [+] on the right side of the appropriate dashboard pane.

The dashboard pane expands and shows the contents applicable to that section (See Figure 5).

CORE ACTIVITY WORK PLAN:
ADMINISTRATION AND STAKEHOLDER COORDINATION

≡ Navigation | + | - | Edit

Mission

Mission:
Administer the Montana Asthma Control Program by managing budgets and staff and establish and maintain strategic partnerships with asthma stakeholders in Montana to expand the reach and impact of asthma control efforts statewide while placing an emphasis on disparate populations.
Manager:
Jessie Fernandes
Approved Amount:
$0.00

Desired Outcomes
Supported Strategic Plan Items
Outcome Metrics
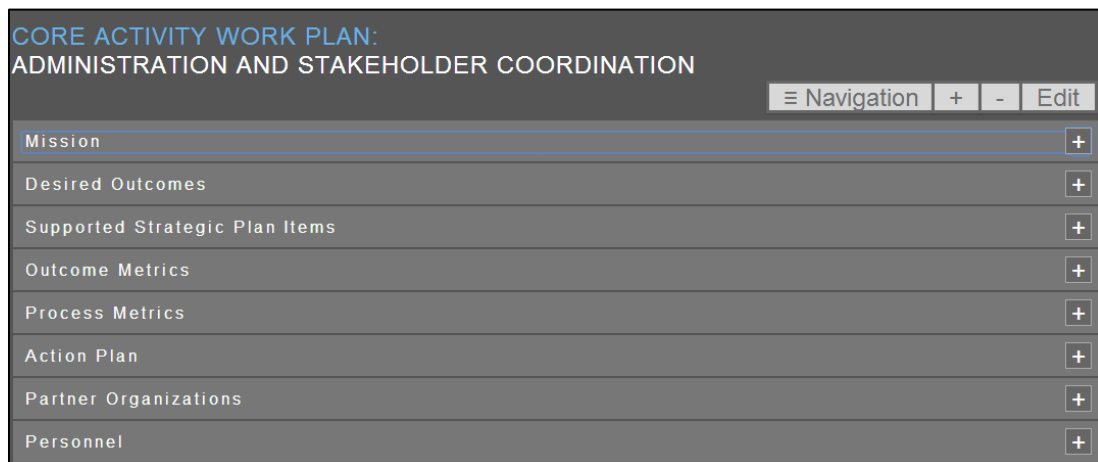Process Metrics
Action Plan
Partner Organizations
Personnel

Figure 5: Core Activity Work Plan (One Section Expanded)

[Optional] Select **Expand All** [+] located above the "Mission" dashboard pane to expand all of the dashboard sections to show the contents of all of the core activity work plan sections.
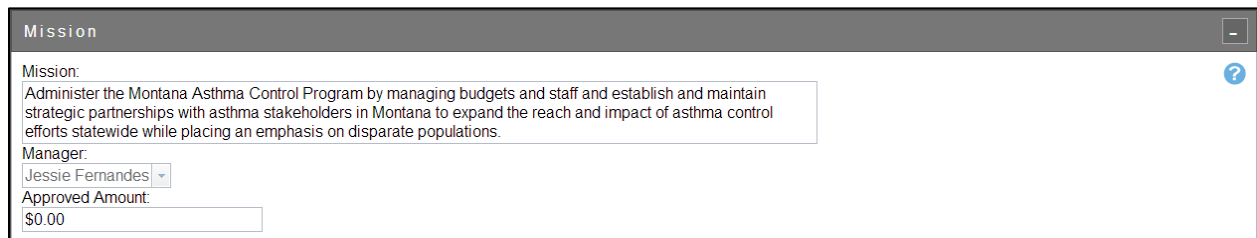
To collapse one of the sections within the core activity work plan:
Do the following:
After accessing the appropriate core activity work plan (see "Using the Navigation Tree"),

select **Collapse** [−] on the right side of the appropriate dashboard section.

The dashboard section collapses and hides the contents applicable to that section (See Figure 3).

Figure 6: Core Activity Work Plan (All Sections Collapsed)

[Optional] Select **Collapse All** [−] located above the "Mission" dashboard section to collapse all of the dashboard panes to hide the contents of all of the core activity work plan sections.

Core Activity Work Plan Overview

Each core activity work plan is comprised of the following eight sections (See Figure 3):
- Mission
- Desired Outcomes
- Supported Strategic Plan Items
- Outcome Metrics
- Process Metrics
- Action Plan
- Partner Organizations
- Personnel

Mission Section

The information found in this section describes the work being conducted by this core activity by stating the services and products provided and for whom they are provided, displaying the one person who serves as the lead contact for the core activity work plan, and the dollar amount of the total budgeted expenses for the fiscal year.
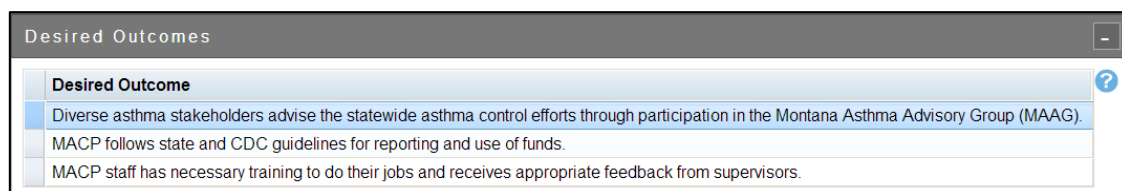

Mission	-

Mission:
Administer the Montana Asthma Control Program by managing budgets and staff and establish and maintain strategic partnerships with asthma stakeholders in Montana to expand the reach and impact of asthma control efforts statewide while placing an emphasis on disparate populations.

Manager:
Jessie Fernandes

Approved Amount:
$0.00

Figure 7: Mission Section

This section is maintained by the system administrator when a core activity work plan is created, removed, or this particular section needs to be modified.

Desired Outcomes Section

The ultimate downstream result or impact that is facilitated by the immediate provision of products or services to a customer or constituent. Desired outcomes must be written in present tense to describe the ***ideal end result*** that is expected to be accomplished if the program or core activity were to succeed ideally through the work completed and the expenditure of funds. While the *Mission* describes what work is being performed, the *Desired Outcomes* explain why this work is done.

Desired Outcomes

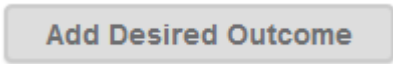| Desired Outcome |
| --- |
| Diverse asthma stakeholders advise the statewide asthma control efforts through participation in the Montana Asthma Advisory Group (MAAG). |
| MACP follows state and CDC guidelines for reporting and use of funds. |
| MACP staff has necessary training to do their jobs and receives appropriate feedback from supervisors. |

Figure 8: Desired Outcomes Section

To add and enter a Desired Outcome, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** on the right side of the **Desired Outcomes** dashboard section.

Click **Add Desired Outcome** to enter the information associated with the Desired Outcome.

Double click inside the text box to make edits. Once finished making the

appropriate edits within the text box, click **Save** **SAVE** .

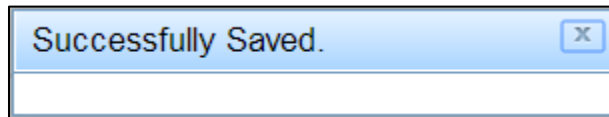The system will prompt you when the changes have successfully been made
(See Figure 9).

Successfully Saved. [x]

Click **Exit** [x] to return to the core activity work plan.

To update a Desired Outcome, do the following:

After accessing the appropriate core activity work plan (see "Using the

Navigation Tree"), select **Expand** [+] on the right side of the **Desired Outcomes** dashboard section.

Click inside the text box which contains the Desired Outcome to be updated.

Once finished making the appropriate edits within the text box, click **Save**

SAVE .

The system will prompt you when the changes have successfully been made
(See Figure 9).

Click **Exit** [x] to return to the core activity work plan.

To delete a Desired Outcome, do the following:

After accessing the appropriate core activity work plan (see "Using the

Navigation Tree"), select **Expand** [+] on the right side of the **Desired Outcomes** dashboard section.

Select the text box which contains the Desired Outcome you want to delete.

Click **Delete Selected Desired Outcome(s)**
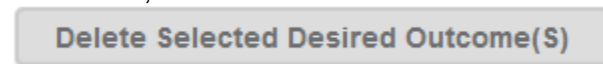
Delete Selected Desired Outcome(S) .

The system deletes the Desired Outcome(s) you selected and removes it from the list.

Click **Save** ![SAVE] .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** ![x] to return to the core activity work plan.

[Optional] If you want to delete multiple Desired Outcomes, hold **Shift** while selecting the applicable Desired Outcomes. Once you have made your selections, click **Delete Selected Desired Outcome(s)**

![Delete Selected Desired Outcome(S)] .

The system deletes all of the Desired Outcome(s) you selected and removes them from the list.

Click **Save** ![SAVE] .

Supported Strategic Plan Items Section

Every core activity should be enabled by a statement somewhere within the PHSD Strategic Plan. No work should be conducted within the Division that is not a strategic priority. A core activity is a deliberate allocation of resources in order to accomplish a strategic goal, strategy, or objective of the Public Health and Safety Division. This work plan section is intended to document which statements in the PHSD Strategic Plan enable the expenditure of funds to carry out the work described in this work plan.

Supported Strategic Plan Items | |

Strategies Supported by Core Activity | ❓
5.1.5) Improve coordination among partners to promote effective public health policies and adequate public health funding. |
6.4.1) Integrate nationally-recognized public health workforce competencies into hiring, performance standard setting, evaluation, individual development planning, orientation, training and succession planning processes. |
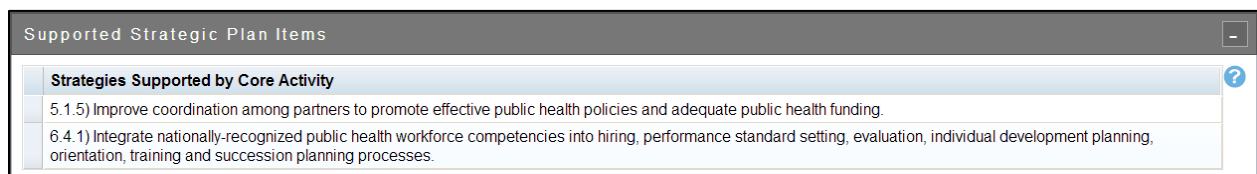
Figure 10: Supported Strategic Plan Items Section

To add and choose a Person associated with the core activity work plan, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** ![+] on the right side of the **Supported Strategic Plan Items** dashboard section.

Click **Add Work Plan Strategy** [Add Workplan Strategy] to enter the information associated with the core activity work plan.

Double-click inside the newly populated drop-down list and select the appropriate stategy.

[Optional] If you want to find a strategy within a large drop-down list, press the first number of the strategies numeric identifier, this will filter the list of strategies to choose from by the number you pressed.

Once finished making the appropriate selection within the drop-down list, click **Save** [SAVE].

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the core activity work plan.

To update Supported Strategies for the core activity work plan, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of the **Supported Strategies** dashboard section.

Double click in the row which contains the Strategy which needs to be updated.

Once finished making the appropriate selections within the Supported Strategic Plan Items section, click **Save** [SAVE].

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the core activity work plan.

To delete Strategies Supporting the core activity work plan, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of the **Supported Strategic Plan Items** dashboard section.

Select the row which contains the Strategy you want to delete.

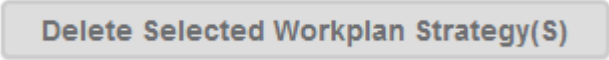Click **Delete Selected Work Plan Strategy(s)** [Delete Selected Workplan Strategy(S)].

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The system deletes the Strategy you selected and removes it from the list.

Click **Save** [SAVE] .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the core activity work plan.

[Optional] If you want to delete multiple strategies, hold **Shift** while selecting the applicable Supported Strategies. Once you have made your selections, click **Delete Selected Work Plan Strategy(s)** [Delete Selected Workplan Strategy(S)] .

The system deletes all of the Strategies you selected and removes them from the list.

Click **Save** [SAVE] .

Outcome Metrics Section
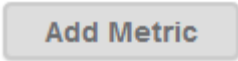
These are metrics that are used to evaluate progress toward achieving the Desired Outcomes in the work plan section above.

Analysis	Outcome Metric	Actual Value	Target Value	Status	Current	
View	Percent of CDC objectives "met" at the end of the year.	0	0	🟥	🟥	

Figure 11: Outcome Metrics Section

To add and enter an Outcome Metric name, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of the **Outcome Metrics** dashboard section.

Click **Add Metric** [Add Metric] to enter the name associated with the Outcome Metric.

Double click inside the text box to make edits. Once finished making the appropriate edits within the text box, click **Save** [SAVE] .

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The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [×] to return to the core activity work plan.

To delete an Outcome Metric, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of the **Outcome Metric** dashboard section.

Select the row which contains the Outcome Metric you want to delete.

Click **Delete Metric(s)** [Delete Metric(S)] .

The system deletes the Outcome Metric(s) you selected and removes it from the list.

Click **Save** [SAVE] .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [×] to return to the core activity work plan.

[Optional] If you want to delete multiple Outcome Metrics, hold **Shift** while selecting the applicable Outcome Metrics. Once you have made your selections, click **Delete Metric(s)** [Delete Metric(S)] .

The system will confirm with you that you want to delete the selected metric(s) and all associated data.

To confirm, press **OK**. Otherwise press **Cancel**.

The system deletes all of the Outcome Metric(s) you selected and removes them from the list.

Click **Save** [SAVE] .

To add, update, or delete outcome metrics' details, see Part VI: Data Visualization and Analysis for more information.

Process Metrics Section

Metrics that are used to evaluate the performance of work processes. These metrics describe the standard of measurement for four types of process performance measures: input, output, efficiency, and quality. An effective approach to brainstorming an initial list of process metrics is to consider each type of process performance measure one at a time.

Input -   Amount of resources used to provide a service or produce an output.

Output -   Quantity or number of services provided or products produced.

Efficiency - Ratio of inputs used per unit of output or the time required to provide a service or produce a product.

Quality -   Degree to which constituents are satisfied with a service or product received; the degree to which services or products meets specifications.

Tip: Once an initial list of metrics is brainstormed, then narrow the list to the vital few that are most useful. Each metric selected requires labor to collect and analyze data, so choose as few as possible, but as many as necessary.
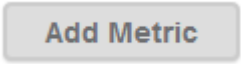
Analysis	Process Metric	Actual Value	Target Value	Status	Current	
View	Average number of professional development hours for each program staff.	0	0	■	■	
View	Number of new partner organizations recruited to the MAAG.	0	0	■	■	
View	Number of coordinated chronic disease projects in which MACP is actively participating.	0	0	■	■	

Figure 12: Process Metrics Section

To add and enter a Process Metric name, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** ➕ on the right side of the **Process Metrics** dashboard section.

Click **Add Metric** [Add Metric] to enter the name associated with the Process Metric.

Double click inside the text box to make edits. Once finished making the appropriate edits within the text box, click **Save** [SAVE] .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the core activity work plan.

To delete a Process Metric, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** on the right side of the **Process Metric** dashboard section.
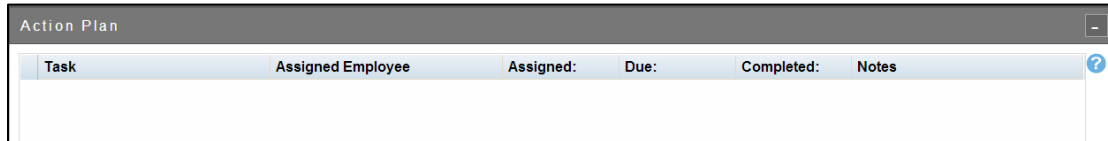
Select the row which contains the Process Metric you want to delete.

Click **Delete Metric(s)** .

The system deletes the Process Metric(s) you selected and removes it from the list.

Click **Save** .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** to return to the core activity work plan.

[Optional] If you want to delete multiple Process Metrics, hold **Shift** while selecting the applicable Process Metrics. Once you have made your selections, click **Delete Metric(s)** .

The system will confirm with you that you want to delete the selected metric(s) and all associated data.

To confirm, press **OK**. Otherwise press **Cancel**.

The system deletes all of the Process Metric(s) you selected and removes them from the list.

Click **Save** .

To add, update, or delete process metrics' details, see Part VI: Data Visualization and Analysis.

Action Plan Section

A time bound to-do-list describing the work that needs to be completed during one fiscal year. It is used to plan needed work tasks and milestones, and anticipate financial and human resources needed to accomplish the work.
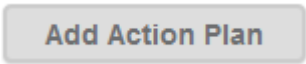
Figure 13: Action Plan Section

To add and enter an Action Plan, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** on the right side of the **Action Plan** dashboard section.

Click **Add Action Plan** to enter the information associated with the Action Plan.

Double click inside the text box under **Task** to edit the name.

[Optional] If you want to use the keyboard to navigate through each Action Plan element within the row, press **Tab** to move from left to right through the elements and press **Shift + Tab** to move from right to left through the elements.

Double-click inside the box under **Assigned Employee** and select the appropriate person from the drop-down list.

[Optional] If you want to find a person within a large drop-down list, press the first letter of the person's last name, this will filter the list of people to choose from by the letter you pressed.

Double-click inside the box under **Assigned** and select the date the task was assigned.

A calendar will populate and you will be able to select a date.

Double-click inside the box under **Due** and select the date the task is due.

A calendar will populate and you will be able to select a date.

Double-click inside the box under **Completed** and select the date the task was completed.

A calendar will populate and you will be able to select a date.

Double-click inside the box under **Notes** to add any notes related to the task.

Once finished making the appropriate edits within the text box, click **Save**

SAVE .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** ⊠ to return to the core activity work plan.

To update an Action Plan, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** ➕ on the right side of the **Action Plan** dashboard section.

Click inside the text box which contains the Action Plan to be updated.

Once finished making the appropriate edits within any of the Action Plan elements,

click **Save** **SAVE** .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** ⊠ to return to the core activity work plan.

To delete an Action Plan, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** ➕ on the right side of the **Action Plan** dashboard section.

Select the row which contains the Action Plan you want to delete.

Click **Delete Selected Action Plan(s)** **Delete Selected Action Plan(S)** .

The system deletes the Action Plan(s) you selected and removes it from the list.

Click **Save** **SAVE** .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** ⊠ to return to the core activity work plan.

[Optional] If you want to delete multiple Action Plans, hold **Shift** while selecting the applicable Action Plans. Once you have made your selections, click **Delete**

Selected Action Plan(s) Delete Selected Action Plan(S) .

The system deletes all of the Action Plan(s) you selected and removes them from the list.

Click **Save** SAVE .

Partner Organizations Section

Other government agencies or private sector organizations collaborating with to accomplish more through a coordinated effort with the funds being allocated to the core activity.
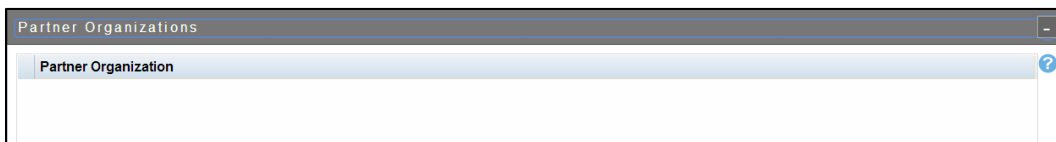
Figure 14: Partner Organizations Section

To add and enter a Partner Organization, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** on the right side of the **Partner Organization** dashboard section.

Click **Add Partner Organization** Add Partner Organization to enter the name of the Partner Organization.

Double click inside the text box to make edits. Once finished making the appropriate edits within the text box, click **Save** SAVE .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** to return to the core activity work plan.

To update a Partner Organization, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of the **Partner Organization** dashboard section.

Click inside the text box which contains the Partner Organization to be updated.

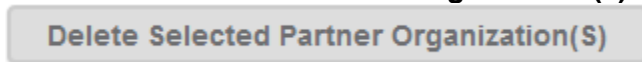Once finished making the appropriate edits within the text box, click **Save**

SAVE
.

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the core activity work plan.

To delete a Partner Organization, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of the **Partner Organization** dashboard section.

Select the text box which contains the Partner Organization you want to delete.

Click **Delete Selected Partner Organization(s)**

Delete Selected Partner Organization(S)
.

The system deletes the Partner Organization(s) you selected and removes it from the list.

Click **Save** **SAVE** .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the core activity work plan.

[Optional] If you want to delete multiple Partner Organizations, hold **Shift** while selecting the applicable Partner Organizations. Once you have made your selections, click **Delete Selected Partner Organization(s)** **Delete Selected Partner Organization(S)** .
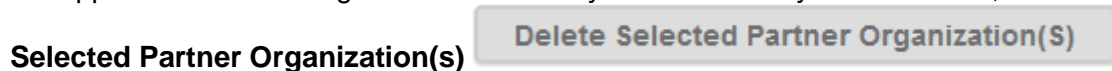
The system deletes all of the Partner Organization(s) you selected and removes them from the list.

Click **Save** SAVE .

Personnel Section

Personnel are allocated to this core activity in order to evaluate whether the assigned resources are adequate to carry out all the tasks listed in this core activity's Action Plan.
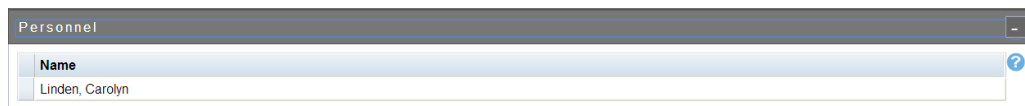
Personnel	
Name	
Linden, Carolyn	

Figure 15: Personnel Section

To add and choose a Person associated with the core activity work plan, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of the **Personnel** dashboard section.

Click **Add Personnel** Add Personnel to enter the information associated with the core activity work plan.

Double-click inside the box under **Name** and select the appropriate person from the drop-down list.

[Optional] If you want to find a person within a large drop-down list, press the first letter of the person's last name, this will filter the list of people to choose from by the letter you pressed.

Once finished making the appropriate edits within the text box, click **Save**

SAVE .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the core activity work plan.

To update Personnel for the core activity work plan, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** on the right side of the **Personnel** dashboard section.

Double click in the row which contains the Name which needs to be updated.

Once finished making the appropriate edits within the Personnel section, click **Save**

 .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** to return to the core activity work plan.

To delete Personnel, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** on the right side of the **Personnel** dashboard section.

Select the row which contains the Name you want to delete.

Click **Delete Selected Personnel** .

The system deletes the Personnel you selected and removes them from the list.

Click **Save** .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** to return to the core activity work plan.

[Optional] If you want to delete multiple names, hold **Shift** while selecting the applicable Personnel. Once you have made your selections, click **Delete Selected Personnel** .
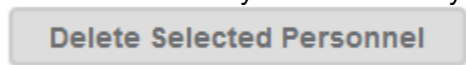
The system deletes all of the Personnel you selected and removes them from the list.

Click **Save** .

CHAPTER 3. DATA VISUALIZATION AND ANALYSIS

This chapter gives detailed explanation of the metric details page. Topics in this chapter include:

- An overview of the various elements of the metric details page
- Accessing a specific metric's details
- How to manage the data associated with the metric and its analysis

Accessing a Specific Metric's Details

To reach a specific metric's details within a core activity work plan:
Do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"),

select **Expand** [+] on the right side of the Outcome Metrics or Process Metrics

dashboard section. Click **View** [View] .

The metric's detail page appears (See Figure 14).

PERCENT OF CDC OBJECTIVES "MET" AT THE END OF THE YEAR.

≡ Navigation | + | - | Edit

Metric Chart

Good

☑☒Target ☑☒Actual

Summary Analysis

Summary Analysis:

Metric Description +

Metric Data +

Metric/Charting Properties +
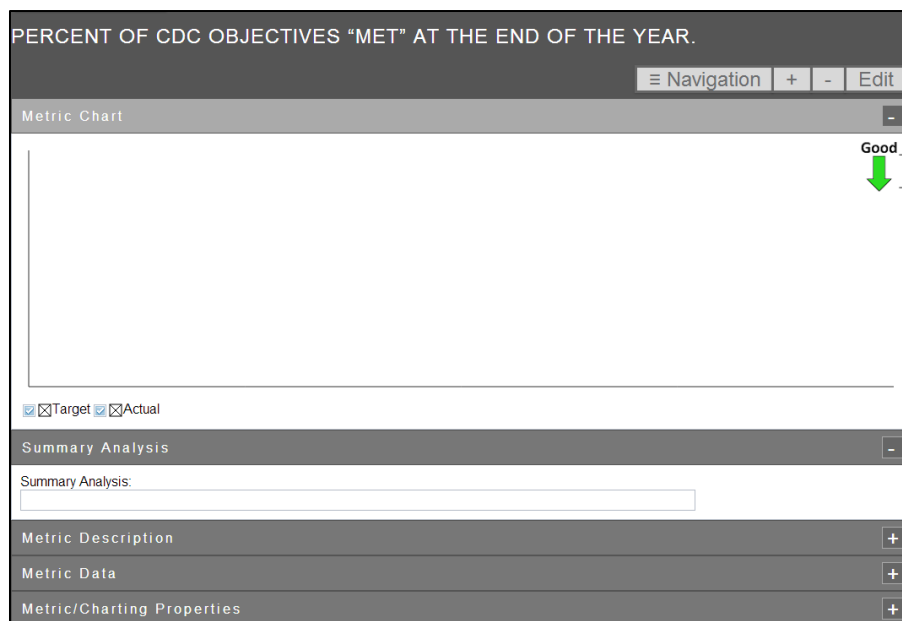
Figure 16: Metric's Detail Page

Note: The Metric Chart and Summary Analysis sections of any metric's detail page is defaulted to show its contents when accessed.

To return to a core activity work plan:
Do the following:

Click **Back to Work Plan** [« Back To Work Plan] .

The Core Activity Work Plan page appears.

[Optional] Select **Width** ▌ located between the navigation and content panes to widen or narrow the width of the navigation pane.

[Optional] Select **Navigation** ≡ Navigation located in the upper right-hand corner of the content pane to hide the navigation pane.

Metric's Detail Page Overview

Each core activity work plan includes outcome metrics and process metrics sections, respectively. A list of metrics is displayed within each of these sections. Upon accessing a specific metric's details (explained below), the metric's details page populates and contains the following five section panes (See Figure 4):

- Metric Chart
- Summary Analysis
- Metric Description
- Metric Data
- Metric/Charting Properties

PERCENT OF CDC OBJECTIVES "MET" AT THE END OF THE YEAR.

≡ Navigation   +   -

Metric Chart	+
Summary Analysis	+
Metric Description	+
Metric Data	+
Metric/Charting Properties	+
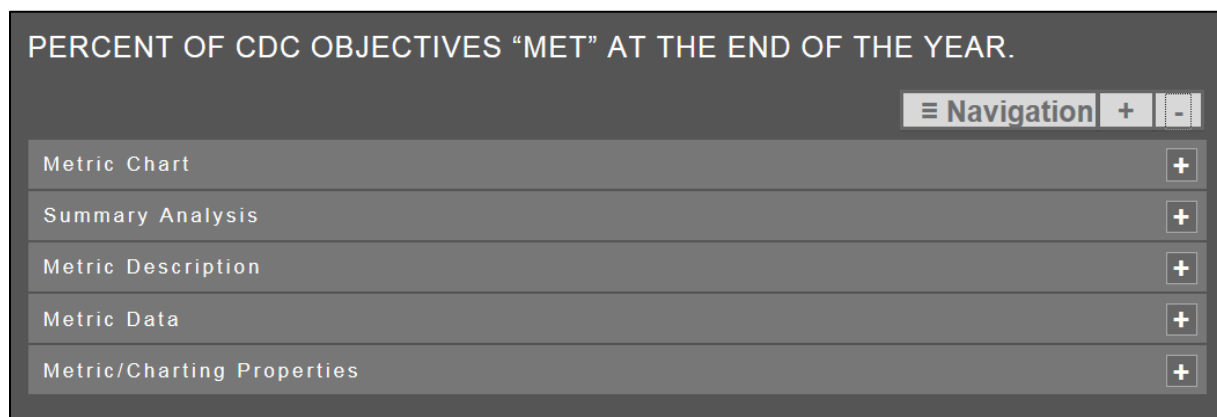
Figure 17: Metric's Detail Page (All Sections Collapsed)

Metric Chart Section

The chart showing the metric's performance is derived from the data recorded in the HealthStat system. Currently, the chart has the ability to represent actual and target values as bar elements and the threshold value as a line element. Future capabilities should include more advanced charting functions.
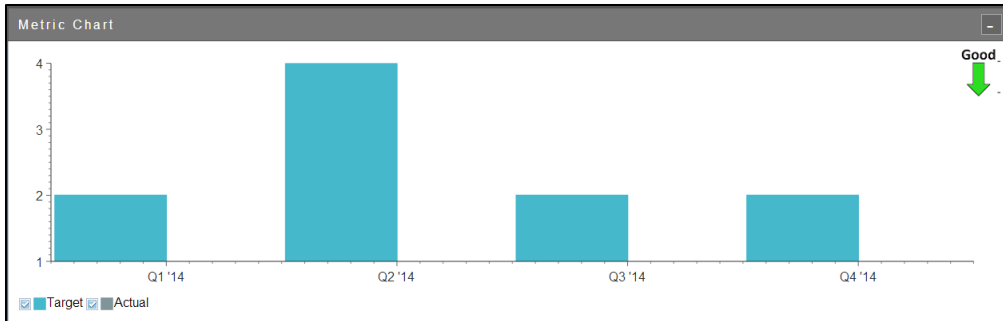
Figure 18: Metric Chart Section
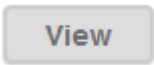
Summary Analysis Section

The summary analysis allows anyone associated with the core activity's metric to break the complexity of the subject into smaller parts so that they, as well as others, can gain a better understanding of what the metric represents and how well it is performing.

Figure 19: Summary Analysis Section

To enter a Summary Analysis, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of either the **Outcome Metrics** or **Process Metrics** dashboard section.

Select **View** [View] next to the metric whose summary analysis you want to edit.

[Optional] An alternative way to access the summary analysis for editing or viewing purposes is by selecting **Edit Metric** [Edit Metric] at the bottom of the **Outcome Metrics** or **Process Metrics** dashboard sections.

Click inside the text box to the right of "Summary Analysis:**"** to enter the Summary Analysis of the applicable metric.

Double click inside the text box to make edits. Once finished making the appropriate edits within the text box, click **Save** [SAVE] .
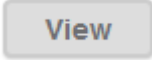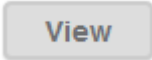
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The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** ☒ to return to the metric's detail page.

To update a Summary Analysis, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** ➕ on the right side of either the **Outcome Metrics** or **Process Metrics** dashboard section.

Select **View** [View] next to the metric whose summary analysis you want to edit.

Click inside the text box to update the metric's Summary Analysis.

Once finished making the appropriate edits within the text box, click **Save**

[SAVE] .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** ☒ to return to the metric's detail page.

To delete a Summary Analysis, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** ➕ on the right side of either the **Outcome Metrics** or **Process Metrics** dashboard section.

Select **View** [View] next to the metric whose summary analysis you want to edit.

Double-click in the text box which contains the Summary Analysis.

Select all contents in the test box and press **Delete.**

The system deletes the information regarding the Summary Analysis of the metric.

Click **Save** [SAVE] .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the metric's detail page.

Metric Description Section

Describe the characteristic and measure this metric quantifies. Discuss how the metric is calculated and what data are included and excluded in calculation.

Define any technical terms necessary to fully understand how to interpret results.

Discuss any of these factors and others as needed to allow the uninformed reader to properly interpret results.
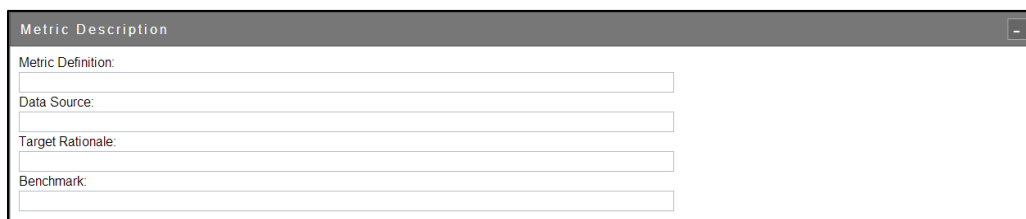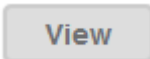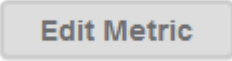

Figure 20: Metric Description Section

To enter a Metric Definition, Data Source, Target Rationale, or Benchmark, do the following:
After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of either the **Outcome Metrics** or **Process Metrics** dashboard section.

Select **View** [View] next to the metric whose Metric Definition, Data Source, Target Rationale, or Benchmark you want to edit.

[Optional] An alternative way to access the summary analysis for editing or viewing purposes is by selecting **Edit Metric** [Edit Metric] at the bottom of the **Outcome Metrics** or **Process Metrics** dashboard sections.

Click inside the text box to the right of the field title to enter the Metric Definition, Data Source, Target Rationale, or Benchmark of the applicable metric.

Double click inside the text box to make edits. Once finished making the appropriate edits within the text box, click **Save** [SAVE].
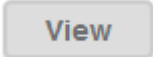
The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the metric's detail page.

To update a Metric Definition, Data Source, Target Rationale, or Benchmark, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of either the **Outcome Metrics** or **Process Metrics** dashboard section.

Select **View** [View] next to the metric whose Metric Definition, Data Source, Target Rationale, or Benchmark you want to edit.

Click inside the text box to update the metric's Metric Definition, Data Source, Target Rationale, or Benchmark.

Once finished making the appropriate edits within the text box, click **Save**
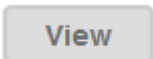
[SAVE] .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the metric's detail page.

To delete a Metric Definition, Data Source, Target Rationale, or Benchmark, do the following:

After accessing the appropriate core activity work plan (see "Using the Navigation Tree"), select **Expand** [+] on the right side of either the **Outcome Metrics** or **Process Metrics** dashboard section.

Select **View** [View] next to the metric whose Metric Definition, Data Source, Target Rationale, or Benchmark you want to delete.

Double-click in the text box which contains the Metric Definition, Data Source, Target Rationale, or Benchmark.

Select all contents in the test box and press **Delete.**

The system deletes the information regarding the Metric Definition, Data Source, Target Rationale, or Benchmark of the metric.
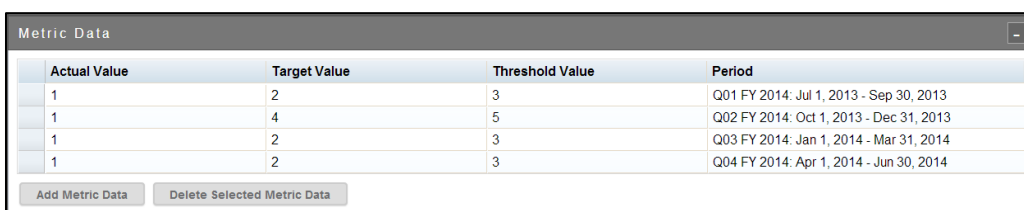
Click **Save** [SAVE] .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** [x] to return to the metric's detail page.

Metric Data Section

Describe when and how the data are collected. Explain why this source and method are valid for analysis and interpretation.

Explain the reasoning behind selection of the target value. What factors affected the decision to select this value?

Metric Data				
	Actual Value	Target Value	Threshold Value	Period
	1	2	3	Q01 FY 2014: Jul 1, 2013 - Sep 30, 2013
	1	4	5	Q02 FY 2014: Oct 1, 2013 - Dec 31, 2013
	1	2	3	Q03 FY 2014: Jan 1, 2014 - Mar 31, 2014
	1	2	3	Q04 FY 2014: Apr 1, 2014 - Jun 30, 2014

Add Metric Data   Delete Selected Metric Data

Figure 21: Metric Data Section

To add and enter new metric data for a particular period in time, do the following:

After accessing the appropriate core activity work plan metric (see "Accessing a Metric's Details"), select **Expand** [+] on the right side of the **Metric Data** dashboard section.

Click **Add Metric Data** [Add Metric Data] to enter the information associated with the Metric.

Double click inside the text box under **Actual Value** to edit the metric's current value for the period.

[Optional] If you want to use the keyboard to navigate through each Metric Data element within the row, press **Tab** to move from left to right through the elements and press **Shift + Tab** to move from right to left through the elements.

Double click inside the text box under **Target Value** to edit the metric's target value for the period.

Double click inside the text box under **Threshold Value** to edit the metric's threshold value for the period.

Double-click inside the box under **Due** and select the date the task is due.

Double-click inside the box under **Period** and select the metric's reporting period from the drop-down list.

Once finished making the appropriate edits within the text box, click **Save**

SAVE

.

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** ☒ to return to the core activity metric's detail page.

To update Metric Data, do the following:

After accessing the appropriate core activity work plan metric (see "Accessing a Metric's Details"), select **Expand** ➕ on the right side of the **Metric Data** dashboard section.

Click inside the text box which contains the Metric Data to be updated.

Once finished making the appropriate edits within any of the Metric Data elements, click **Save** **SAVE** .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** ☒ to return to the core activity metric's details page.

To delete Metric Data, do the following:

After accessing the appropriate core activity work plan metric (see "Accessing a Metric's Details"), select **Expand** ➕ on the right side of the **Metric Data** dashboard section.

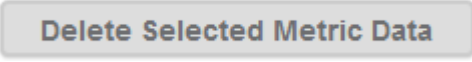Select the row which contains the Metric Data you want to delete.

Click **Delete Selected Metric Data** **Delete Selected Metric Data** .

The system deletes the Metric Data you selected and removes it from the list.

Click **Save** **SAVE** .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** ☒ to return to the core activity work plan.

[Optional] If you want to delete multiple Metric Data rows, hold **Shift** while selecting the applicable Metric Data rows. Once you have made your selections, click **Delete**
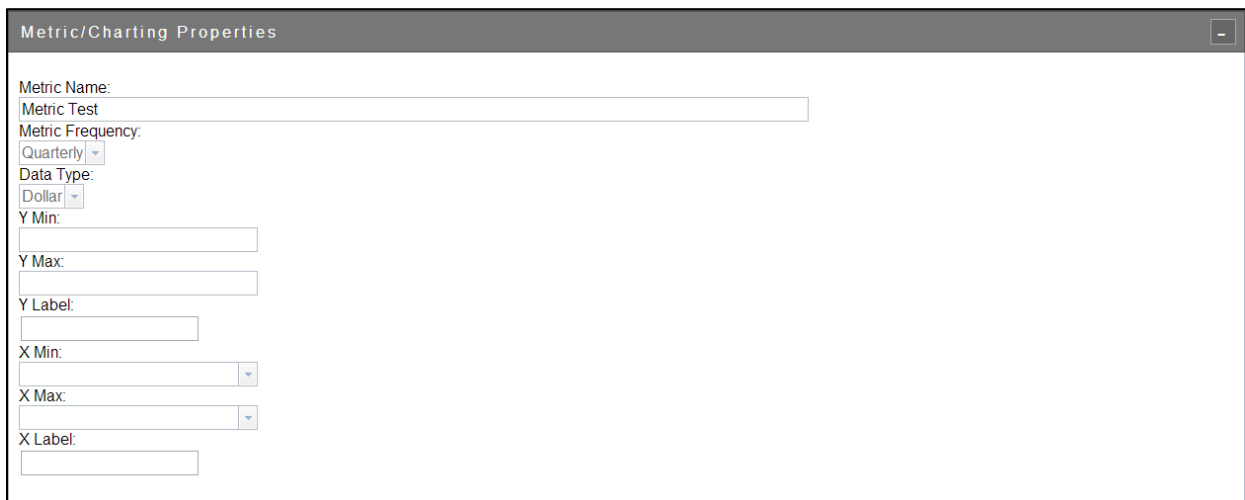
Selected Metric Data Delete Selected Metric Data .

The system deletes all of the Metric Data you selected and removes it from the list.

Click **Save** SAVE .

Metric/Charting Properties Section

To add and enter new metric data for a particular period in time, do the following:

After accessing the appropriate core activity work plan metric (see "Accessing a Metric's Details"), select **Expand** ➕ on the right side of the **Metric/Charting Properties** dashboard section.

Double click inside the text box beside **Metric Name** to edit the metric's name.

[Optional] If you want to use the keyboard to navigate through each Metric/Charting property, press **Tab** to move down from a row and press **Shift + Tab** to move from up from a row.

Click the drop-down list box beside **Metric Frequency** to edit the metric's frequency for recording data.

Click the drop-down list box beside **Data Type** to edit the metric's data type.

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Double click inside the text box beside **Y Min** to edit the metric's minimum Y-axis value for its chart.

Double click inside the text box beside **Y Max** to edit the metric's maximum Y-axis value for its chart.

Double click inside the text box beside **Y Label** to edit the metric's Y-axis label.

Click the drop-down box beside **X Min** to edit the metric's minimum X-axis value for its chart.

Click the drop-down box beside **X Max** to edit the metric's maximum X-axis value for its chart.

Double click inside the text box beside **X Label** to edit the metric's X-axis label.

Once finished making the appropriate edits within the text box, click **Save**

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** to return to the core activity metric's detail page.

To update Metric/Charting Properties, do the following:

After accessing the appropriate core activity work plan metric (see "Accessing a Metric's Details"), select **Expand** on the right side of the **Metric/Charting Properties** dashboard section.

Click inside the text or drop-down list box which contains the Metric/Charting Property to be updated.

Once finished making the appropriate edits within any of the Metric/Charting Properties, click **Save** .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** to return to the core activity metric's details page.

To delete Metric/Charting Properties, do the following:

After accessing the appropriate core activity work plan metric (see "Accessing a Metric's Details"), select **Expand** on the right side of the **Metric/Charting Properties** dashboard section.

Select the row which contains the Metric/Charting Properties you want to delete.

Click **Save** .

The system will prompt you when the changes have successfully been made (See Figure 9).

Click **Exit** to return to the core activity work plan.